

Job Aid: How to Create an RPA Requisition

This Job Aid shows how to:

- Create an RPA Requisition in COMMBUYS

Of Special Note:

RPA is a Request for Payment Authorization after a purchase has been made for items or service not on an enabled SWC. These purchases are somewhat rare. They must be approved by the appropriate authority at your agency prior to purchase. Purchasing through SWC or normal procure is always the preferred path.

Screenshot

Directions

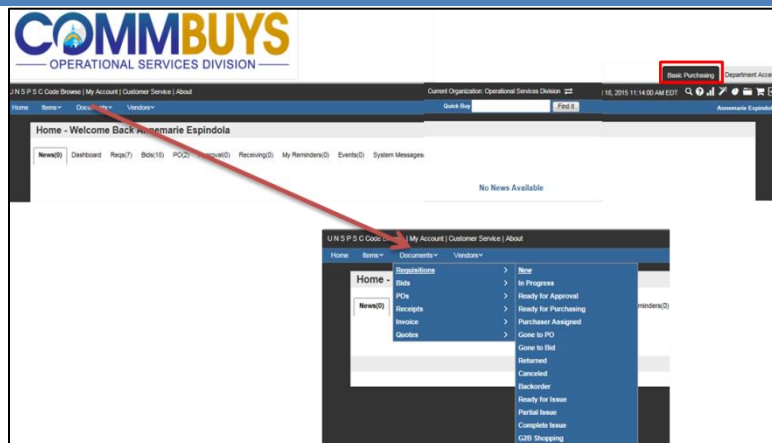


Step 1: Launch COMMBUYS

1. Launch the COMMBUYS website by entering the [URL](https://www.commbuys.com/bso) <https://www.commbuys.com/bso> in the browser.
2. Enter your login credentials and click the **Login** button on the COMMBUYS home page.

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Screenshot



Directions

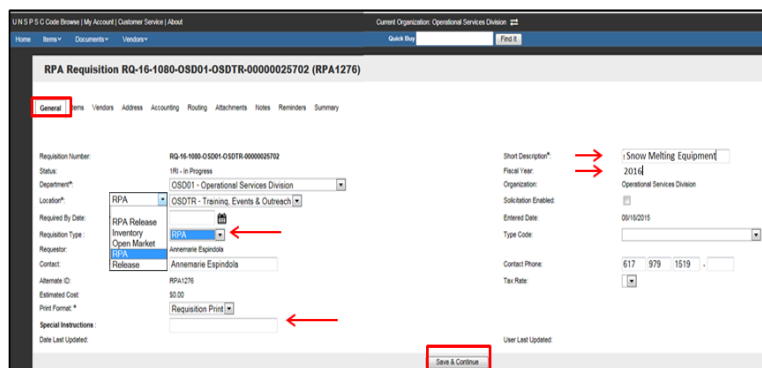
Step 2: Start a new Requisition

1. From the Navigation Bar, select **Documents > Requisitions > New**

Step 3: Enter data in General tab

This is the **General Tab** of the New Requisition Page under **Basic Purchasing**. For an RPA that is not on an enabled Statewide Contract.

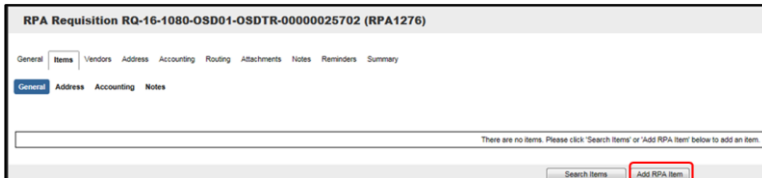
- **Requisition Type:** Select RPA (not open market)
- **Short Description:** of Goods or Service. We will use Snow Melting Equipment
- **Fiscal Year:** Check for Accuracy
- **Special Instructions Field:** Special instructions allow for entry of specific instruction to vendors. When entered on the requisition the data in this field will copy forward to the PO and also be visible on the print version of the PO." It can also be used to give a vendor specific instruction such as shipping or delivery or anything else. **This field is available on the requisition and the PO.**
- Select **Save and Continue**
- After page refreshes **click on Items Tab**



Job Aid: How to Create an RPA Requisition

Screenshot

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RPA Requisition RQ-16-1080-OSD01-OSDTR-0000025702 (RPA1276)

General Items Vendors Address Accounting Routing Attachments Notes Reminders Summary


General Address Accounting Notes

There are no items. Please click "Search Items" or "Add RPA Item" below to add an item.

Search Items Add RPA Item

Step 4: Search for items to add to requisition
The Items tab opens.

- Select **Add RPA item** (not Search Items).



RPA Requisition RQ-16-1080-OSD01-OSDTR-0000025759 (RPA1288)

General Items Vendors Address Accounting Routing Attachments Notes Reminders Summary

General Address Accounting Notes

Confirmation Messages

Changes saved successfully.

Item # 1 Item Type Normal Item Status 100 - In Progress

Description: Snow Making Equipment

Invoice #	Invoice Date (MM/DD/YYYY)	Payment Due Date (MM/DD/YYYY)	Quantity	Unit Cost	Net Unit Cost	UOM	Discount %	Total Discount Amt.	Total
02348	06/11/2016	10/01/2016	10.0	1000.00	\$1000.00	EA	0.0	0.0	\$10000.00

UNSPSC Segment Family: 45-10 45-10 - Public safety and control

UNSPSC Class: 15 15 - Traffic control

Commodity Code: 45-10-15-00-0000

Manufacturer: Brand: Model:

Save & Add New Save & Exit Save & Continue Reset Cancel & Exit

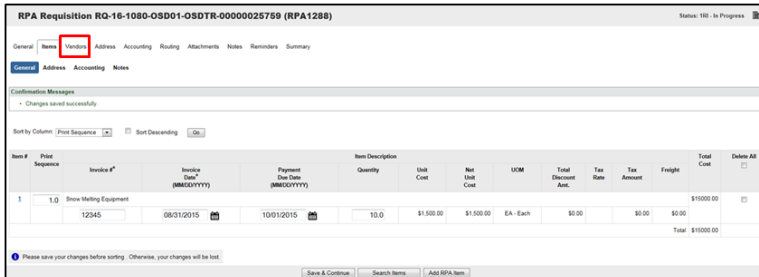
Step 5: The page refreshes to the General information page under the Items tab

- Enter description of your mdse. or service purchase.
- Enter an invoice number based on the information on your vendor invoice (must be unique).
- Enter today's date for the Invoice Date.
- Enter a Payment Due Date.
- Enter the number of items you purchased.
- Enter the unit cost of your item.
- Enter the Unit of Measure – Here we selected ea. For each
- Enter the UNSPSC Segment-Family Code and the Class Code - Use lookup to match the commodity or service purchased.
- Click **Save and Exit**.

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RPA Requisition RQ-16-1080-OSD01-OSDTR-0000025759 (RPA1288)

General **Vendors** Address Accounting Routing Attachments Notes Reminders Summary

Confirmation Messages

Sort By Columns: [First Sequence] [Sort Descending]

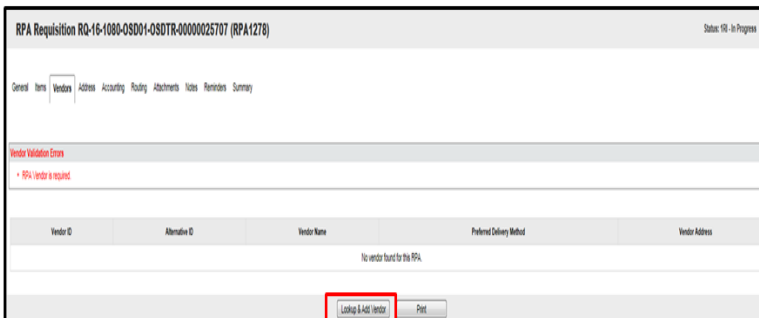
Item #	Price Sequence	Invoice #	Invoice Date (MM/DD/YYYY)	Payment Due Date (MM/DD/YYYY)	Item Description	Quantity	Unit Cost	Net Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Freight	Total Cost	Delete All
1	1.0	12345	08/31/2015	10/01/2015	Shoe Molding Equipment	10.0	\$1,500.00	\$1,500.00	EA - Each	\$0.00	\$0.00	\$0.00		\$15000.00	<input type="checkbox"/>
														Total	\$15000.00

Please save your changes before sorting. Otherwise, your changes will be lost.

Save & Continue Search Items Add RPA Item

Step 6: The screen refreshes to show the item saved successfully. Check all information for accuracy before moving on.

- Click on the **Vendors Tab**



RPA Requisition RQ-16-1080-OSD01-OSDTR-0000025707 (RPA1278)

General **Vendors** Address Accounting Routing Attachments Notes Reminders Summary

Vendor Validation Errors

1 RPA Vendor is required.

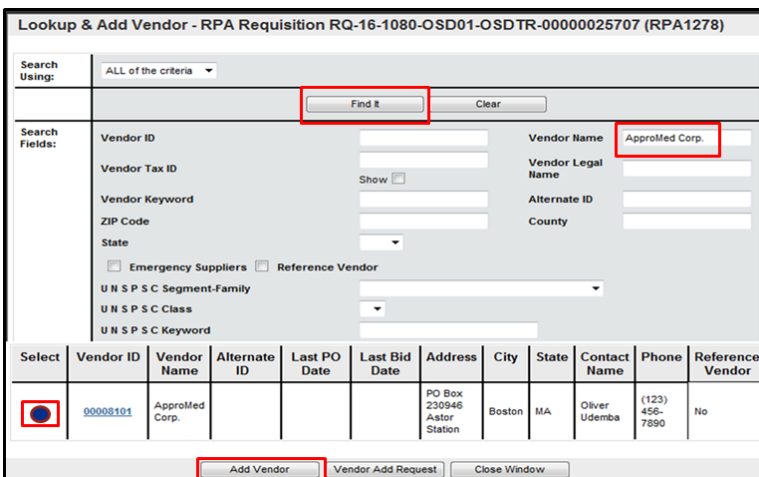
Vendor ID	Alternate ID	Vendor Name	Preferred Delivery Method	Vendor Address
No vendor found for the RPA.				

Lookup & Add Vendor Post

Step 7: Vendor selection Page.

- Select **Lookup & Add Vendor**.

Note: The vendor must be registered in COMMBUYS. If not, then they should register immediately. If the Vendor needs assistance with registration, please refer them to the COMMBUYS helpdesk. Information on contacting the Helpdesk will be provided at the end of the webinar.



Lookup & Add Vendor - RPA Requisition RQ-16-1080-OSD01-OSDTR-0000025707 (RPA1278)

Search Using: ALL of the criteria

Find It Clear

Search Fields:

Vendor ID: Vendor Name: **ApproMed Corp.**

Vendor Tax ID: Show ☐ Vendor Legal Name:

Vendor Keyword: Alternate ID:

ZIP Code: County:

State:

☐ Emergency Suppliers ☐ Reference Vendor

UNSPSC Segment-Family:

UNSPSC Class:

UNSPSC Keyword:

Select	Vendor ID	Vendor Name	Alternate ID	Last PO Date	Last Bid Date	Address	City	State	Contact Name	Phone	Reference Vendor
<input checked="" type="checkbox"/>	00008101	ApproMed Corp.				PO Box 230946 Arlington Station	Boston	MA	Oliver Udembu	(123) 456-7890	No

Add Vendor Vendor Add Request Close Window

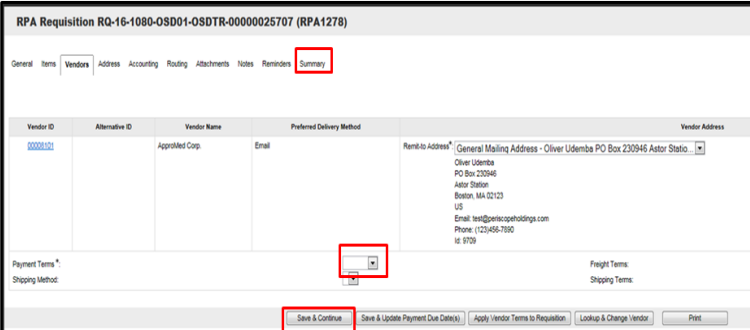
Step 8: This is the Vendor Selection Page

- Enter the Vendor name and click **Find It**.
- Select your **Vendor**
- Select **Add Vendor** button.

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Screenshot

Directions



RPA Requisition RQ-16-1080-OSD01-OSDTR-00000025707 (RPA1278)

General Items Vendors Address Accounting Routing Attachments Notes Reminders **Summary**

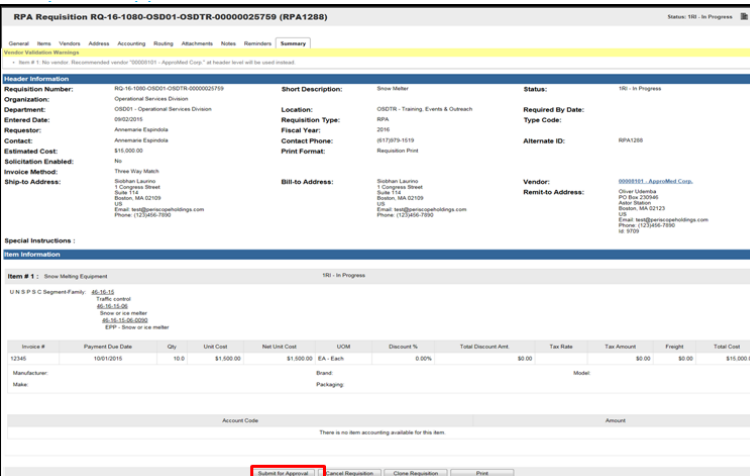
Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method	Vendor Address
00001001		Approved Corp.	Email	Remit-to Address: <input type="text" value="General Mailing Address - Oliver Utemba PO Box 230946 Astor Station Boston, MA 02123 US"/> Oliver Utemba PO Box 230946 Astor Station Boston, MA 02123 US Email: test@operationaldivisions.com Phone: (123)456-7890 Is: 9709

Payment Terms: Freight Terms:
 Shipping Method: Shipping Terms:

Save & Continue Save & Update Payment Due Details Apply Vendor Terms to Requisition Lookup & Change Vendor Print

Step 9: The page refreshes to show the Vendor information.

- Select **Payment Terms** from the drop down box. This should be based on the payment due date you entered previously.
- Click **Save & Continue** to save the information. When the page refreshes
- Click on the **Summary Tab**



RPA Requisition RQ-16-1080-OSD01-OSDTR-00000025759 (RPA1288) Status: 100 - In Progress

General Items Vendors Address Accounting Routing Attachments Notes Reminders **Summary**

Vendor Information Message: Item # 1: No vendor. Recommended vendor "00000101 - Approved Corp." at header level will be used instead.

Header Information	Short Description	Status
Requisition Number: RQ-16-1080-OSD01-OSDTR-00000025759 Organization: Operational Services Division Department: OSD01 - Operational Services Division Internal Date: 09/01/2016 Requester: Anonymous Expenditure Contact: Anonymous Expenditure Estimated Cost: \$15,000.00 Solicitation Enabled: No Invoice Method: Three Way Match Ship-to Address: Stephen Levine, 1 Corporate Street, Suite 700, Lowell, MA 01850-1000 Email: test@operationaldivisions.com, Phone: (123)456-7890	Location: OSD01 - Training, Events & Outreach Requisition Type: 0076 Fiscal Year: 2016 Contact Phone: (817)875-1010 Print Format: Requisition Print	100 - In Progress Required By Date: Type Code: Alternate ID: 00001001

Special Instructions	Item Information
	Item # 1: Snow Mowing Equipment U N S P S C Segment Family: 45.16.15 Traffic Control: 45.16.15.05 Snow at or near road: 45.16.15.05.0000 EPP - Snow at or near road

Invoice #	Payment Due Date	Qty	Unit Cost	Net Unit Cost	UOM	Discount %	Total Discount Amt	Tax Rate	Tax Amount	Freight	Total Cost
1001/2016	10/1/2016	10.0	\$1,500.00	\$1,500.00	EA - Each	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$15,000.00

Manufacturer: Brand: Model: Packaging: Account Code: Amount: There is no item accounting available for this item.

Submit for Approval Cancel Requisition Close Requisition Print

Step 10: This is the Summary page. Check all the information for accuracy and make corrections if necessary by returning to the appropriate tab to make and save any needed changes.

Then return to the **Summary Tab**

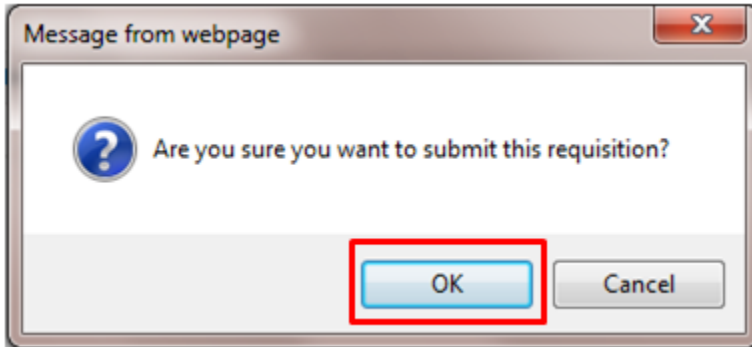
- Click **Submit for Approval**.

Job Aid:

How to Create an RPA Requisition

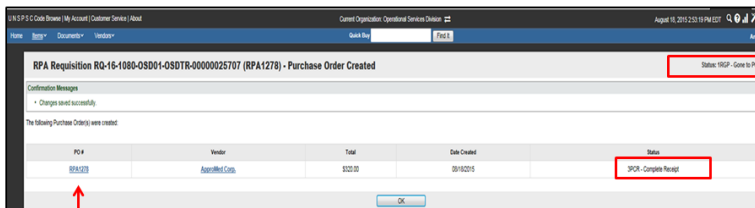
Screenshot

Directions



Step 11: Dialogue Box appears, asking if you are “sure you want to submit this requisition”

Click OK.



Step 12: This screen shows that the Requisition has gone to Purchase Order.

Click on **PO# Hyperlink** to see newly created PO. It will have a status of Complete Receipt.

Please NOTE: The Vendor will not see this P.O.